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ABSTRACT

Case studies are a respected form of research. They are seen as useful because they deal with information in a complex, holistic, process oriented, particularistic way that mirrors the reality of life in school settings. Several forces impinge on their usefulness in helping others to learn from past experiences and thus improve their own situations. Readers of case studies are often interested in the perspectives and actions of people in their own roles at a level of detail which is impossible to present in a case study. Practitioners lack the time to deal with the length necessitated in case studies. The values and theoretical orientations of readers have major impact on their receptivity to case study material. The match between the skills and styles of the reader and that of the actors in the case study can effect ultimate usefulness. Finally, the perceived similarity of settings and the reader's approach to learning from the case study can enter into judgements about usefulness. This knowledge has implications for what can be done to make case studies more useful. The author presents suggestions concerning extending the process of research use, disseminating the case study to the right audience, and dealing with the problem of length. (Author/GC)

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INFLUENCES ON THE USEFULNESS OF CASE STUDIES

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INTRODUCTION

The National Institute of Education (NIE) is interested in discovering what aspects of local school communities constitute a capacity for sustained problem solving and how these capacities can be developed. NIE is also interested in finding new arrangements both for conducting and for utilizing research so that the experiences of school/communities trying innovative approaches to building these capacities can genuinely inform and benefit other school/communities. The Center for New Schools' Documentation and Technical Assistance Project (DTA) received a contract to document the innovative work at sites chosen by NIE and to explore methods of learning from and using their experiences.[1]

Research can be conducted and reported in many forms. One currently popular form which has a long respected tradition and which is believed to be especially "useful" is the case study. Havelock articulates this commonly accepted feeling that case studies are useful in his study of knowledge utilization: Planning for Innovation. After surveying the literature he noted,

> We were disappointed to find so few case studies. Of the thousands of dissemination and utilization events that take place each year it is unsettling to find so few documented in such a way that others could learn from them. This deficiency in the

> literature was one of the factors that thwarted our effort to code, analyze, and compare utilization processes across studies and fields. Each investigator, in effect, has his own special interests or his own special point to make, and few appear to be motivated simply to report what happened in specific utilization events. (1969, p. 1-17 his italics)

Of course, the value of case studies and the need for more of them is not restricted to studies dealing with utilization.

Many reasons are offered for the usefulness of the case study. Lou Smith notes that case studies have a quality of "undeniability." Their holistic and at the same time detailed qualities make them especially powerful and realistic information, and thus able to influence a reader's actions. (1973, p. 7)

Stake notes that case study format comes close to simulating the way people know and understand in everyday life:

> I believe it is reasonable to conclude that one of the most effective means of adding to understanding - for all readers - will be by approximating

> through the words and illustrations of our reports the natural experience attained in ordinary personal involvement. (1976, p. 2)[2]

Over the last several years the federal government has supported the production of many case studies and our NIE contract calls for case studies as part of our output. My tendency is to agree that the case study is a potentially powerful format. However, as part of my role of directing the research of an experimental knowledge utilization project, I have taken a critical and questioning stance.

In this paper I will examine in more that usual depth the usefulness of case studies. I want to explore how the unique characteristics of case study research can support, enhance or impede the actual use of this research. In this exploration I will draw on my experiences in our DTA project. These experiences include both my activity in the production and refinement of case studies with ultimate usefulness in mind and my interactions with my colleagues in our project in trying to use information gathered. This exploration will contribute to the general understanding of research utilization and will inform our own efforts within the DTA project to work with the case studies we have written.

Meaning of "Case Study" and "Usefulness"

In order to discuss the usefulness of case studies I will clarify what I mean by "case study" and by "useful." There are certain basic

generic qualities of case studies:

1. Case Studies are particularistic: They portray events in one particular situation as it exists in reality.
2. They are holistic: They try to capture as many variables as possible and often include descriptions of history and context. They try to portray the interplay of different features and forces as they bear on the topic of interest. They usually present the views of different groups of actors. Brandt (1972) suggests they might be the ultimate multivariate study.
3. They are longitudinal: Usually they have a dynamic quality and tell a story which covers a period of time.
4. They are qualitative: Usually case studies use prose and literary technique to describe, to elicit images, and to analyze situations rather than summaries of quantitative data. They present documentation of events, quotes, samples of artifacts, etc.[3]

A case study, then, is a process of research which tries to describe and analyze some entity in qualitative, complex, and comprehensive terms not infrequently as it unfolds over a period of time.[4]

Usefulness of a case study is an elusive notion. One must wonder, useful to whom and for what purposes? For this discussion, I will let useful mean that a DTA case study helps people in other locations to move toward improving their local schools based on the experiences of the nine sites. I will return later to the question of useful to whom.

Limits on Discussion of Usefulness of Case Studies:

Before proceeding, I will point out some limits to this discussion of usefulness of case studies that are highlighted by DTA project experiences. First, there are many ways to learn from experience besides the particular consolidation of data and analysis which is called a case study.[5] These various ways will not be considered in this paper.

Also, there is possible confusion about whether we are discussing the usefulness of producing a case study as a total research process or specifically the written summary report of that process. We are focusing our present comments on the written summary, which is the researcher's reporting and analysis, although many of our conclusions are also relevant to other written and oral communications of field researchers.

There is another major issue complicating this discussion. Although we

are focusing on the usefulness of case studies as a form, it is often hard to separate the description from the thing described or, as the old folk saying goes, the messenger often gets attacked for the message. This means that in the following pages where we identify reasons why people think case studies are useful or not useful, we can acknowledge that often there are similar reasons why people think particular innovative ideas are useful or not useful. Although we have tried to emphasize the special impact that comes from having ideas presented in a case study format, we recognize that it is often impossible to separate reactions to the description from the thing described. Thus some of our ideas about case studies are similar to what other researchers have discovered about what makes innovative ideas acceptable or not acceptable. (For example, see Berman & McLaughlin, 1974; Havelock, 1969, House, 1975; Miles et al, 1969; and Rogers and Shoemaker, 1971).

On a common sense level case study information seems intrinsically valuable. The reader expands his/her experience through the vicarious sharing of someone else's experiences. It is as though the reader is able to live more than one life and to be in more than one place at a time. In a good case study readers can in some way surpass reality. They gain the benefit of having the perspectives of several groups of actors and the luxury of having had a researcher at the site to watch, probe, and analyze for them. We have discovered several obstacles to this common sense notion. Usefulness cannot be discussed in a vacuum.

ISSUES WHICH INFLUENCE USEFULNESS OF CASE STUDIES

Role of Reader

Usefulness is related to the role of the reader. By its very nature a case study usually tries to provide information on the actions and perspectives of members of a variety of groups. Given the limitations of length, writers of case studies must make decisions about who to concentrate on. They can either opt for evenhanded treatment of different groups or, if there is a substantive basis for the decision, emphasize certain perspectives.

We have discovered that the logic of writing a case study may not match the logic of usefulness to the reader. Any given reader will want much more detail about perspectives and actions of particular kinds of actors (usually people in their own role) than would make sense in the overall context of a case study. There is an inevitable lack of detail arising from the difficulty of having a balanced case study focus sufficently on each reader's role. Certainly people feel they can learn from inspecting the actions and perspectives of all participants but this information lacks the immediacy, power, and impact of material in which one sees himself. As our field summaries show:

> One case study focuses on a teacher advisory service which works to set up mutual support arrangements among teachers. The case study discusses the role of the principal in these

schools, but in nowhere as much detail as it treats the actions and perspectives of the teacher and the helpers in that setting. In one school where DTA was doing technical assistance work, the principal was interested in adopting this kind of arrangement. The Site Researcher was asked in conversations to expand greatly on the role of the principal in the school she studied.

We discovered another important consideration about the role of readers who are potential users. In the DTA project we have had two interrelated but different audiences for our case studies.

1. There are interveners, the members of various technical assistance efforts. These are the people whose jobs it is to think generally about how urban education can be improved and who have the responsibility actually to work with people.
2. There are the practitioners. These people already have principal roles and responsibilities in the setting.

> In addition to working on improvement
> they have ongoing responsibilities that
> are often more demanding.

This is an important distincition. The interveners are freer to consider a variety of courses of action. Their responsibility, after all, is to facilitate innovative improvement. It is easy for them to imagine themselves in relation to the case study. This is true at least until they embark on a certain course of action. Then they become much more like the practitioners in that they no longer feel they have great latitude.

The practitioners, on the other hand, have a strong sense of their givens, their constraints. Also they have daily realities which color their reading of a case study. They are compelled to be more interested in concrete detail they can apply tomorrow than in general principles or themes.

> During early stages in DTA my colleagues,
> who prime responsibility was to use
> our new information in helping the
> chosen user sites, were interested
> in case study material from many sites.
> Once they had started working with
> school people and had made certain
> general decisions, their interest

> focused to particular sites and they requested more detail.

It may be that one case study cannot serve both of these audiences. Those who have the responsibility to make decisions may not be interested in the same kind of material as those who have an ongoing responsibility in a situation and are simultaneously working to change it.

Time to Read and Length of Case Studies

Practitioners often complain that they do not have the time to read case studies. They already feel there is more to read than they can possibly deal with just to keep abreast of new ideas for teaching. Case studies are too long and because they are often not directly focused on the line of action on which the person is presently focused, they are low in priority.

> As our case study drafts first began to come in I excitedly took them to some of our technical assistance people. I didn't have to wait for them to say anything; it was clear from the distressed non-verbal face and body signals that the case studies were a problem. They explained that it would be hard to get people in the sites to read them. Indeed, it would

be hard even for them to find the time to read the studies.

Fritz Mulhauser (1975) has noted that this problem of length and complexity does not affect only front line practitioners. Policy makers at higher levels (e.g., Congressional Committees, School Board Superintendents) also lack the time to read detailed case study reports. Futhermore, they are often searching for clear guidelines in preference to sorting through complex descriptions of reality to extract their own meanings.

Again the logic of case study writing may not match the logic of use. Some of the major strengths of the case study format are its ability and willingness to deal with interwoven complexity, with multiplicity, with the details of concrete daily reality, and with developments over time. Case studies often need to use literary technique to paint pictures which have any verisimilitude. All of these qualities combine to make case studies long.

Values and Theoretical Orientations of Readers

As much as we might like to think that information can be somewhat neutral, case studies are likely to be most interesting to people who already value some of the approaches illustrated. Additionally, the approaches are valued, case studies are more likely to lead to action.

The educational enterprise is value laden both in its goals and processes. People have favorite theoretical frameworks for assessing

what is right and wrong and for determining what lines of action are worth pursuing. Judgements about usefulness are inevitably colored by these judgements. As mentioned earlier, these value predispositions effect judgements about the usefulness or appropriateness of innovations per se, not only of case study descriptions.

This value question becomes even more complex where there is the dual audience we describe of interveners and practitioners. The usefulness must pass this double screen of values--it must not be unacceptable to either.

> Our case studies describe strategies which run the gamut from parent power to teacher centers to organizational consultations to arrangements for increased teacher participation. Particular interveners shy away from seriously considering particular strategies--e.g., organizational development or parent power. These case studies can be judged less useful, not necessarily because of the information in them, but rather because of a lack of value conguence with what the interveners would seriously consider for personal action.

> Interveners are constantly making judgements about the values of the practitioners they work with and about the perceived interest they judge people would have in certain kinds of information. For example, I've heard comments such as "I don't think Principal A would go for that approach," or "That strategy used to be a big thing in the district but its not now".

It's pleasant to think that the power of the events and story depicted in a case study will in themselves force people to take note. There are several reasons this is unlikely to happen.

1. There are few complex structural change projects that have such unequivocal effectiveness that they compel the negatively disposed reader to take note. Interstingly, a good case study contains the seeds of its own denial. Given the variegated nature of "success" in reality, the unfavorably disposed reader can point to weaknesses and difficulties.

(These same qualities, of course, place the favorably disposed reader in a stronger position to use the information by avoiding some of the earlier difficulties.)

2. Information itself is not a very powerful force for changing attitudes. Researchers in the area of attitude change (e.g., Jahoda & Warren, 1966) have noted that people tend to select to read what is already congruent with their beliefs and tend to remember what is congruent. A case study dealing with material that is in conflict with the values of the reader is working against major pressures, and it is unlikely the reader would judge it useful. Even more, the real world time demands on practitioners means that the length and complexity of a case study make it seem even less useful-especially one which deals with material that is unacceptable in value terms.

One must be careful about oversimplifying since values are not an on-off switch controlling consideration of information. There are interpersonal and political factors which lead readers to consider material that was not judged at first to be congruent with their values. Similarly, time and exposure can increase the perceived relevance of material. Nevertheless, the values of the potential user are an important ingredient in determining usefulness.

Experience, Style, and Expertise of the Potential User

Any consideration of the usefulness of case studies as they relate to eventual action must take into account the experience, style, and competence of the reader. If the case study depicts actions that are within the realm of experience of the reader, then they are more likely to have an effect than if they describe a totally strange world. Even if the reader is impressed with the story told and the efficacy of the actions depicted, the reader has a strong sense of his or her limits and the amount of effort that might be required to learn how to pull off what people in the case study accomplished.

> In one case study the principal was a key actor in generating genuine active parent action in educational policy making. The principal's firm grounding in the sensitivity group work of the 60's and his awareness and ability ro resonate with the cultural

mores and styles of his parents (his "down homeness") contributed to his creating an environment that was not alien for them. For some readers reproducing this style would be difficult if not disasterous. A technical assistance person speaking of a principal they were working with said "that's clearly not her style --it won't work" (referring to the style of the principal in the studied site).

Another case study describes the creation of collegial support arrangements among teachers based on a shared educational orientation as a powerful approach to sustained improvement. Many readers would feel that they lacked the experience to function as master teachers in this format. This realization can be an impediment to the perceived usefulness of this case study.

Another case history tells the story

of street wise community organizing in preparation for parent participation in the school. The skills and styles needed for organizing in urban communities seem to be a prerequisite to using the material in this case study.

Of course, even if the reader feels his or her skills do not match what is called for in some of the examples, there is likely to be other material that fits better and can be useful. Nonetheless, the reader's sense of her own orientation is an important determinant of perceived usefulness.

The fact that case studies try to present events in their natural complexity to play up the perspectives of the actors and to present as much graphic detail as possible make this issue of readers' competency that much more salient. The case study provides the kind of material that enables a reader to feel and to imagine what these kinds of actions might really involve. The reader is less able to engage in unrealistic fantasies about potential actions when confronted with the case study description. Also if the reader <u>has</u> the skills that are necessary the case lets him imagine real possible action.

Personal expertise and skills enter into judgements about usefulness of case studies in yet another way. If a practitioner is comfortable with his own experience, then that experience often carries more power

than a case study done by a remote researcher in an incompletely known setting. The firing line quality of real settings calls for gut, seasoned responses born out of a person's first hand experience with events. A case study can add to a person's repertoire and cause her to reflect on her reaction tendencies, but the predominant influences are first-hand experience. This fact limits the usefulness case studies can have.

> Lou Smith (1976) did a mini-study of the DTA system. He noted that when he put himself in the place of our technical assistance workers, he could see important pressures working against use of our case study material. The demand qualities of the situation they find themselves in means that they probably are forced to pay more attention to their own instincts, their own experience, and the reactions of the people they are working with than to a case study done by a researcher who may have had less years experience in schools than they have.

Generalizability and the Context of the Reader

One of the perennial questions asked about case studies is how can information from one setting be useful in another setting or how does one generalize from a sample of one case?[6] On some common sense basis it would seem that the more congruity between the subject of the case study and the place where the information is going to be used, then the more likely it is to be of interest and of use.[7] If this is true, then there would be a continuum of usefulness starting within the very setting where the information was gathered and stretching to very dissimilar settings. For example,

> One of our case studies tells the story of the attempt to establish a teacher center to serve four schools. Presumably this case study would be most valuable for the people involved in that effort, next for people involved in establishing other kinds of teacher support arrangements or trying to establish some kind of support structure not necessarily for teachers to serve a group of schools, and so on.

The easier it is for people to see themselves in the description, then the more useful they might consider the material.[8]

The lack of similarity of settings, however, does not necessarily make case studies irrelevant. In fact, case studies are tricky in in this regard. They give enough detail and description of the uniqueness of the setting that anyone who wanted to could discount the solution based on the dissimilarity of the setting. On the other hand, they give enough detail about how the influences are played out in the setting, that the readers can make the bridge between the setting studied and their own setting. The approach of the reader seems to be important. Lou Smith notes that case studies can be "individualized":

> Each person can clarify the similarities and the differences in his own setting, his own organization, his own personality. With even minimal discussion he can ask the questions which "bug him," work through the immediate perceptions of possible difficulties "at home," test his experience against the elements of the case. (1973, p. 7)

The question of setting and generalizability is ultimately related to what and how the reader is trying to learn from the case study. We would suggest that readers have a continuum of styles of learning ranging from the concrete to the abstract. We would also suggest that the similarity of setting is most important at the concrete end. Center for New Schools (1974) has in the past tried to work with a notion of

extracting critical activities which try to bridge the gap between the concrete how to's and analysis. For practitioners interested in action the concrete seems the most immediately important.

> Within DTA the questions most often asked were very concrete "how-to's" and how not-to's" and what factors to consider: How did they get parents involved? How did the interveners in the studied site make entry? What did they do about district administrators? How did they get teachers to stay after school? Why did they run into trouble with the principal?

Case studies are ideal sources for this kind of information although, usually the need for detail is secondary to the realistic constraints of the length of a case study as with the details of presenting the perspectives of particular roles discussed earlier. Context becomes most important in this kind of learning--ideally providing a good match or, if not that, providing the reader with enough material at least to do a translation job.

There is another way for readers to learn from cases which is less limited. It involves getting a feel for how things "come down" in schools, for sensing what happens in improvement activities, and for

generally extending one's experience and thus gaining both the power and the sensitivity to act. This way of thinking is not too common for social scientists and is more at home in the humanities. Stake calls this process of learning naturalistic generalization. I would suggest similarity of context is not so important in this kind of learning.

> Naturalistic generalizations develop within a person as a result of experience. They form from the tacit knowledge of how things are, why they are, how people feel about them, and how these things are likely to be later on in other places with which this person is familiar. They seldom take the form of predictions but lead regularly to the expectation. They guide action, in fact, they are inseparable from action. (Stake, 1976 p. 6)

Social scientists and interveners do not often allow themselves consciously to deal with information in this mode. We need to explore this kind of learning more and see what impact it might have on action.

SUMMARY

Case studies are a long respected form of research which are seen as useful because they deal with information in a complex, holistic, process oriented, particularistic way that mirrors the reality of life in school settings. Several forces impinge on their usefulness in helping others to learn from past experiences and thus improve their own situations. Readers of case studies are often interested in the perspectives and actions of people in their own roles to a level of detail impossible to present in a case study. Practitioners lack the time to deal with the length necessitated in case studies. The values and theoretical orientations of readers have major impact on their receptivity to case study material. The match between the skills and styles of the reader and that of the actors in the case study can effect ultimate usefulness. Finally, the perceived similarity of settings and the reader's approach to learning from the case study can enter into judgements about usefulness.

IMPLICATIONS

This knowledge has implications for what we do about making case studies more useful. Several actions are suggested:

A. Extended Process of Research/Use:

Maybe social scientists are radically wrong to think of the case study research process being over with the writing of the case study. It seems inevitable that potential users will want and

need more detail and different kinds of information than it is possible to present in a case study. Maybe we need to alter our thinking about research to include a debriefing stage. The case study can set the stage for users profitably to ask questions of the researcher, to ask questions of the site participants and to do their own inspection of site documents and unanalyzed field data.

One model for a similar kind of process is the learning from cases that used by the Harvard Business School (Towl, 65) where classes are organized around intensive studies of cases. What we propose is slightly different, because it is not part of a formalized educational process and is specifically aimed at helping people with particular action needs. Nonetheless, an intensive guided experience with case studies can magnify their power and usefulness.

B. Getting the Case Study to the Right People

We have pointed out how the user's role, value and theoretical orientations, skills and styles, and setting can all influence the perceived usefulness of the case study. It would seem important then that care be taken to identify the proper audiences and to develop arrangements such that the people and the case study get together -- for instance, through specialized communication networks (NIE, 1976).

Another approach less dependent on person-to-person contact is specialized condensation of the case study. For example, for any case study, the researcher could take pains after it is written to extract material especially aimed at people in particular roles, for example, principals or teachers. Thus, in our case study about the attempt to establish teacher centers there might be two appendices. One appendix would emphasize the perspectives and actions of principals involved and try to answer questions that a principal might ask. The other would emphasize the perspectives and actions of teachers.

C. Dealing with the Problem of Length

It seems unlikely that the availability of time for people working with schools to read lengthy case studies will increase. Thus, we need to find ways to extract and condense for audiences who lack the luxury of time. The Center for New Schools is also interested in serving parents and other community member in this way as well as professionals.

Often urban school community members lack the background and experience to deal with case study material. Thus we need ways to communicate material from these studies in nonacademic ways -- e.g., photographic brochures for the public.

We see major challenge ahead in finding ways to condense and popularize without losing the valuable and unique attributes of

case study, namely, preserving the complexity of reality and conveying it's everyday feeling.

We in the DTA project are actively engaged in explorations of different methods of using case studies. We believe there is valuable material in our case studies and in the others now being produced in other projects but that also there is much to be learned about how best to use them.

FOOTNOTES

[1]The DTA project has two major functions:

> The documentation team has the responsibility for studying the nine sites, writing case studies, conducting cross site analysis, and helping technical assistors to learn form the data. The technical assistance team has the responsibility for intervening in urban schools other than the nine original sites, for helping them build capacities for problem solving, and for exploring ways of learning from the data.

[2]All the methodological and epistemological arguments about the proper ways to study and think about human events are, of course, indirectly relevant to the discussion of usefulness of case studies. It does not make sense, however, within the context of this paper to repeat all those arguments. For those discussions the reader is referred to Bruyn, 1966; Ianncone & Lutz, 1969; Stake, 1976; Hamilton, 1976; and Wilson, 1977.

[3]Both Bob Stake, and Lou Smith have noted similar generic qualities:

> Stake describes what he sees as common characterstics. He states that: descriptions are complex, holistic, and involving a myriad of not highly isolated variables; that the data are likely to be gathered at least in part by personalistic observation; that the study is likely to be reported in an informal perhaps narrative style, possibly using verbal quotation, illustration, and even allusion and metaphor. Comparisons are implicit rather than explicit. Themes and hypotheses may be important, but they remain subordinate to understanding of the case. (1976, p. 8)
>
> Lou Smith lists the following characteristics: credible, holistic, particularistic, individualizable, process-oriented, ego-involving, and blending of behavioral and phenonenological methodologies (1973, p. 7).

[4]Of course, the quality of case studies can vary greatly - e.g., some researchers build more rapport and hence gain more access to actor sentiment, some are more perceptive in their observation and note subtle significant details, some are more skillful in the reporting so that they evoke for the reader a more vibrant resonant sense of what went on. Similarly the structure of case studies can vary--e.g., in the relative amounts of description and analysis they have or in the degree to which they were designed to test theory or to generate theory, etc. Characteristics such as these are important in thinking about the usefulness of case studies and DTA will be

investigating this variability. Our concern here, however, is with the more generic qualities of case studies qua case study and so the issue of variability within the case study mode is not essential.

[5] In fact DTA is investigating and emphasizing other methods even more than learning from case studies. These other methods are discussed elsewhere (King, 1976, Schmuck & Runkel, 1976, Holmes, M. & Schnesul, J., 1976, Wilson, 1976). They include the following:

- -Practitioner visits to exemplary sites
- -Testimonial and analysis from exemplary site participants
- -Debriefing and directed analysis of site researcher
- -Direct analysis of field notes and documents
- -Cross site analysis

Interestingly, all of these methods could be said to be enhanced by case study kinds of data even if they are not directly based on the case study -- e.g., the choice of whose testimonial would most benefit a user site one was trying to help is aided from a site researcher's knowledge of a studied setting. Nonetheless, they are not direct use of case studies per se.

[6] Again a full answer to this question would take us beyond the scope of this paper into questions of epistemology and the most appropriate ways to study human events. Interested readers are urged to consult Stake (1976) and Hamilton (1976).

[7] This kind of view about the importance of similarity is supported by the extensive transfer of learning research conducted by psychologists. (e.g., Gagne, 1965)

[8] There are several ideas, however, that countervail against this common sense notion. In the most similar setting - i.e., the same setting being studied and helped-there are unique pressures which mitigate against the information being useful -- for instance, defensiveness and protective socialized blindness (For more, see CNS, 1974). Also some dialectical thinkers would note that confrontation with a different reality would offer a comparative perspective which in some ways is more powerful than comes from looking at a similar setting. Finally, there is the question of what, after all, is a similar setting? In the example in the text the similarity of school district leadership might have been more important than similarity of intended innovation.

Many different qualities of settings seem important in influencing what happens in schools -- perhaps as many different qualities as there

are different disciplines and research traditions. Each influential quality becomes an important candidate for being considered as important for similarity.

For instance:

Contemporary societal forces in the setting -- e.g., financial state, activity of unions, desegregation actions.
The nature of the school system - prime thrusts.
The nature of the city.
Demographic patterns of schools and communities - nature of teachers and students.
Intention of the innovation.
Particular history of the setting.
Etc.

The literature and our own work suggest that all these factors as well as others are important. As with matched group designs in psychological research, it is usually impossible really to match settings. With out dual model of interveners and practitioners, the match becomes even more difficult because the settings of both would need to be similar.

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